

PROCEDURES FOR SURVEYING STATE AGENCIES

Services Delivered Directly by State Agency Headquarters

Agencies with Assigned Statewide I&R System Liaisons

Each regional contractor of the Statewide I&R Systems having liaison responsibilities for a state agency will be responsible for updating that agency and its statewide database information. This shall include program information on direct services meeting I&R Inclusion/Exclusion criteria that are delivered from the headquarters.

The individual in each state agency designated as the liaison to the Statewide I&R System may designate some other appropriate part of their agency, such as an Office of Communications or Public Information, to work with the regional contractor in collecting and classifying this information.

Current and complete information should be gathered on programs of the above agencies, including appropriate statewide keywords (no regional keywords) and current taxonomy terms.

The regional contractor surveying will share the headquarters information with the other contractors. The sharing may be done via "pdf" file or in a paper format. Once regional contractors are using the same agency and program fields in the standard software, exports shall be used.

The regional contractor surveying will transfer the data on headquarters services to the statewide Web site.

Except for the regional contractor surveying, other contractors will mark the programs "do not export".

Schedule

Each agency will be surveyed and the information shared at least once every 12 months following the schedule below. The responsible regional contractor will supply interim updates to all other regions when significant changes occur.

First Quarter	July-September	1 agency
Second Quarter	October-December	1 agency
Third Quarter	January-March	1 agency
Fourth Quarter	April-June	1 agency

Suggested Procedure

Prior to meeting with the person in each state agency designated to work on the updating procedure, review the agency's Web site and develop preliminary lists of their centrally-delivered and regionally or locally-delivered human services.

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Review the agency's listing on the Statewide 2-1-1 Web site and in your own database to locate any additional programs or questions that need clarification.

Share with the liaison in each state agency the current customized Outline of Taxonomy Terms from the AIRS/InfoLine Taxonomy of Human Services. This is the version adopted by the Statewide Database Users Group. Have them identify the terms that apply to their central, regional or local delivered human services, listing the appropriate terms under each service. This will give you a common language and assist in writing accurate descriptions.

In each regional database, the formal update should be the date the information was supplied to the surveying center.

Agencies with No Assigned Statewide I&R System Liaisons

These state agencies will be surveyed annually by the regional contractor where the agency is located.

Current and complete information needs to be gathered on programs of the above agencies, including appropriate statewide keywords (no regional keywords) and current customized Taxonomy terms.

The regional contractor surveying will share the headquarters information with the other contractors. This sharing may be done via "pdf" file or in paper format. Once regional contractors are using the same agency and program fields in the standard software, exports shall be used.

The regional contractor surveying will transfer the data on headquarters services to the statewide Web site.

Except for the regional contractor surveying, other contractors will mark the programs "do not export."

Schedule

Agencies will be surveyed and the information shared at least once every 12 months on the surveying region's schedule. The responsible regional contractor will supply interim updates to all other regions when significant changes occur.

In each regional database, the date of the formal update will be the date that the information was supplied to the surveying center.

Services Delivered Locally or Regionally by State Agencies

Each regional 2-1-1 center will be responsible for surveying and maintaining data on the direct services of local or regional offices of state agencies located within their region and for exporting this data to the statewide Web site.

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The prototype descriptions and classifications, including appropriate statewide keywords and current taxonomy terms, developed by the liaison regional contractors shall be used as a format for these local services.

Suggested Procedure

Complete surveys for all local offices of a particular state agency at the same time. Finish one agency before starting the next.

Compare the current listings in your regional database with the prototype listings.

Revise existing program descriptions and add any that are missing. If your database lists additional services, keep them and update them with the others.

Send a copy of the listing for each agency, with all its programs, to the agency director or the person she/he designates. Explain that they were developed under a new procedure whereby their state office is supplying descriptions for them to confirm.

In cases where a local or regional office uses agreements with other agencies to deliver a standard service, remove the service from the local agency and attach it to the delivering agency. Revise the agency narrative and program narrative and service area descriptions to reflect the delivery of services on behalf of the local office.

For example, if local department of social services (DSS) "A" has arranged for a neighboring local DSS "B" to deliver all their adoption services: Do not list adoption as a service of local DSS "A." Revise the description of adoption services under local DSS "B" to say that they serve locality "A" in addition to their own "B." Show this in the area served fields of the local DSS "B" adoption service as well. In the agency description for local DSS "A," add a sentence that their adoption services are delivered by local DSS "B."

If the local or regional office does not respond to the Regional Center's request for confirmation, the information supplied by the headquarters shall be deemed to be permission to list the agency in the regional database. In the fields "Survey completed by" enter the name and title of the headquarters person, if it is known, or "Statewide I&R System Liaison," if the name is not known.

In each regional database, the formal update date should be the date the information was supplied by the local office. If the local office fails to confirm its listing, the date listed should be the date the prototype listing was developed by the Regional Center liaison to the state headquarters.